

# Minutes: Meeting to Discuss the PSR Project's Impacts on the Associations

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**Meeting purpose** HBB, the PSR team and the Associations met to discuss how the Association are preparing for the business and system changes resulting from the PSR project.

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**Meeting date, time, and place** Date: August 28, 2008  
Time: 9:00 a.m. – 10:00 a.m.  
Place: CalPERS, LPE 2831  
Dial-in number: 866-793-6939 Participant Passcode: 3472871

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**Attendees** Attending the meeting were representatives from the following organizations

- Anthem Blue Cross: Mark Johnson
  - Blue Shield: Terri Baker and Debbie Rafter
  - CAHP: Charline Chalas, Carrie Lane, Brenda Palmer
  - CCPOA: Suman Jha, Michael Smalley
  - PORAC: Maria Jimenez, Sally Wong
  - CalPERS / PSR: Kevin Brown, Anita DaSilva, Karla Gillespie, Glenda Hlawaty, Kristin Owens, Philip Peacock, Janet Perry, Sandy Santiago, Kristine Scully, Susan Takeda, and Michelle Thomas-Duruisseau
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**Discussion topics** The table below identifies the topics discussed in the meeting and the person who led each discussion.

Topic	Discussion Leader(s)	Time (minutes)
Introductions	Kevin Brown	5
Anticipated PSR changes and timelines	Kevin Brown and Janet Perry	15
Association preparation plans	All	30
Next steps	Kevin Brown	5

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### **Key points: Background**

Kevin provided the following background information:

- based on comments at the August 14, 2008, Health Carrier meeting, CalPERS recognizes that the Associations and Health Carriers have different needs and questions, so CalPERS will have monthly meetings with the Associations to discuss the PSR system changes and impacts, and
  - CalPERS will include information about dental and other payments in the Health Carrier Information packet.
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### **Key points: Dental and direct pay**

Kevin and Janet provided the following information in response to questions from the Associations:

- HBB/PSR team will make sure the Associations are invited to future dental meetings.
  - Dental payments will be handled as direct pays.
  - There is a specific PSR process for direct pay and CalPERS staff will make sure the associations are in touch with the appropriate PSR staff.
  - Union dues, life insurance and other deductibles are handled in the same manner as dental payments.
  - Retirees should contact CalPERS directly for medical.
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### **Key points: Monthly premium reports – Association comments**

The association retrieves reports from the secure FTP site, which includes the premium and the portion collected from employers and employees. The associations use the reports to reconcile with enrollment per CalPERS' requirement. Additional comments from the Associations or Anthem Blue Cross include:

- Associations contracting through Anthem do not need the reports for audits because Anthem handles the enrollment audits with CalPERS.
  - Associations would like confirmation on the availability and format of the reports.
  - CCPOA currently receives 4 or 5 CDs, one for each plan, and the paper reports. If CCPOA can't submit the information via CD, then CCPOA will need to change its processes.
    - HBB staff thought these files may be a RIBs extract, which they are looking into now, and
    - HBB staff requested CCPOA send the file format to its CalPERS contract manager.
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### **Key points: monthly premium reports – HBB and PSR team comments**

HBB staff and the PSR team noted the following:

- In the my|CalPERS (PSR) world, access to the files will be through secure FTP or log-on with a business partner id.
  - The biggest change for the associations is that they will need the employee's CalPERS unique identification number for direct pay transactions.
  - The layout/format for monthly reports will be included in the carrier packet.
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### Key points: CalPERS unique identifier

The following summarizes the discussion about the CalPERS Unique Identifier (CalPERS ID):

- The CalPERS ID will be used for direct authorizations/payments and is 10 (ten) digits long.
- Currently, the PSR design shows that it is incumbent upon the Health Carrier or Association to get the CalPERS ID from members
  - CalPERS will supply the IDs at go-live, but later Associations must get the ID from the member, and
  - members with CalPERS warrants will have the ID on the warrant.
- The Associations noted that they will have to change their forms to accommodate the CalPERS ID - will CalPERS be changing their forms? (PSR team will research this)
- CalPERS will need to educate its members about the CalPERS ID to ensure that the members will be able to provide this information to the Associations.
- The CalPERS ID will go online when the PSR project goes live – the PSR Team is still looking at November 2009
  - the Associations are concerned that they will not be able to meet this deadline, and
  - the PSR Team indicated that CalPERS will look at each situation.
- Currently, the Associations can look up a member's SSN on ACES, but this functionality is going away – the PSR Team check about that and see if functionality will be there.
- Before my|CalPERS goes live, the plan is for the Associations to receive a file with their members CalPERS ID so they can upload that information into their systems
  - CCPOA wondered if they could send a list of all their members to CalPERS and have CalPERS match up the members and IDs and then send the file back, rather than the Association receiving a file with all CalPERS members and their IDs, AND
  - The PSR team indicated that the current plan is the opposite, but will check if this request is possible.
- The current PSR plan is that dependent SSNs are not required.
- At the time of a COBRA new enrollment, the SSN will be obtained.
- The 834 forms will not have CalPERS IDs.
- For children whose parents aren't together, how they are identified will depend upon how they are enrolled.

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### **Key points: File formats and samples**

The following summarizes the discussion about the PSR file formats and sample files:

- As soon as the file formats for the PSR environment are available, HBB staff will forward them to the Associations.
  - The account information will remain unchanged – PSR will look at each by the bargaining unit and that's where they will go under that umbrella
    - the Associations asked if there will be a reference table to map to as they build it – when comes on paper we have to search for the association and ask the association if that person belongs – it is a time-consuming process – will something in the account identify if they are eligible for the association?
    - the current PSR plan is to show BU and contract the members belong to. There will be an appointment id, so for state employees, the contract will be at the state level and employer will enter appointment id that identifies that state agency – this is for medical only. For public agencies there will be medical group identifiers – for example they work for the City of Elk Grove and medical code that they are a supervisor.
  - HBB staff noted that the employer code and name is on the ANSI 834 code and that staff is working on the employer table now. The table is a top priority and something should be available soon. HBB did hand out a CD with the current environment's ANSI 834 codes at the end of the Carrier meeting on the 14<sup>th</sup>.
  - The PSR team is unaware of any changes to the employee contributions.
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### **Key points: Association requests**

The following summarizes the Associations' concerns and requests:

- The Associations need as much lead time as possible to implement these process and system changes.
  - CCPOA noted that they now do all their adds and deletes via paper.
  - The Associations want to be kept in the loop.
  - CAHP is behind - they don't have any full time programmers on staff. ANSI 834 is a completely foreign concept. They do everything in paper now, so going electronic is huge, but believe they will be okay and are hiring a consultant
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### Key points: Association requests, continued

- PORAC would like samples of files, layouts and data to begin preparing for the new system
  - HBB staff will check on that and will provide test files out of the current system and will check about the PSR test files, and
  - PORAC would like to be on a list to receive file formats, data and information.
- PORAC wondered if there is any specific encryption/decryption software?
  - the PSR team noted that if the Association is receiving the file via FTP, then they are okay. CalPERS is moving from encrypted CDs.
- PORAC wondered if special software required is for download?
  - the PSR team noted there is no special software required if downloading from a CalPERS site.

### Actions

The following actions were identified during the meeting:

Owner	Action	Status/Comment
CCPOA	Send format of files now receiving on CDs	Complete – CalPERS received file
CalPERS Contract managers	Email Associations PSR information such as meeting notices, file formats, and sample files.	On-going.
Anita DaSilva	Schedule next Association meeting	In progress – target date is October
Kevin Brown	Add the following to the Health Carrier information packet: layouts for monthly deduction register files, dental enrollment, and direct payments	In progress – target date is late-October
MIS Unit	Create sample 834 file of the current environment	In progress

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### Actions, continued

Owner	Action	Status/Comment
Philip Peacock	Will CalPERS be changing forms to accommodate the CalPERS ID?	Complete - Yes. While all changes have not been identified, all forms will be evaluated to determine if the CalPERS ID needs to be added to the form
Philip Peacock	Can the Associations send a file of their members and have CalPERS match those members with their CalPERS ID and return the file?	In progress - Currently not in approach for distributing CalPERS IDs. Checking with technical team to determine if this request can be accommodated.
Janet Perry	Ensure Associations are invited to dental meetings	In progress
PSR Team (Phil Peacock)	Will the Associations have the ability to look up an SSN and then find the ID in the my CalPERS environment?	Complete - The Association will be able to view a member's current health enrollment summary information in my CalPERS and this page includes the CalPERS ID. Access to this summary page is via the Monthly Billing Report page.

**Next meeting** The next Association meeting will be in late-October. CalPERS staff will contact the Associations with the specifics in late-September or early-October. Possible topics include:

- answers to PSR and HBB action items
- Q&A session with CalPERS ANSI experts
- PSR file formats, and
- continued discussion of impact of moving away from paper forms.